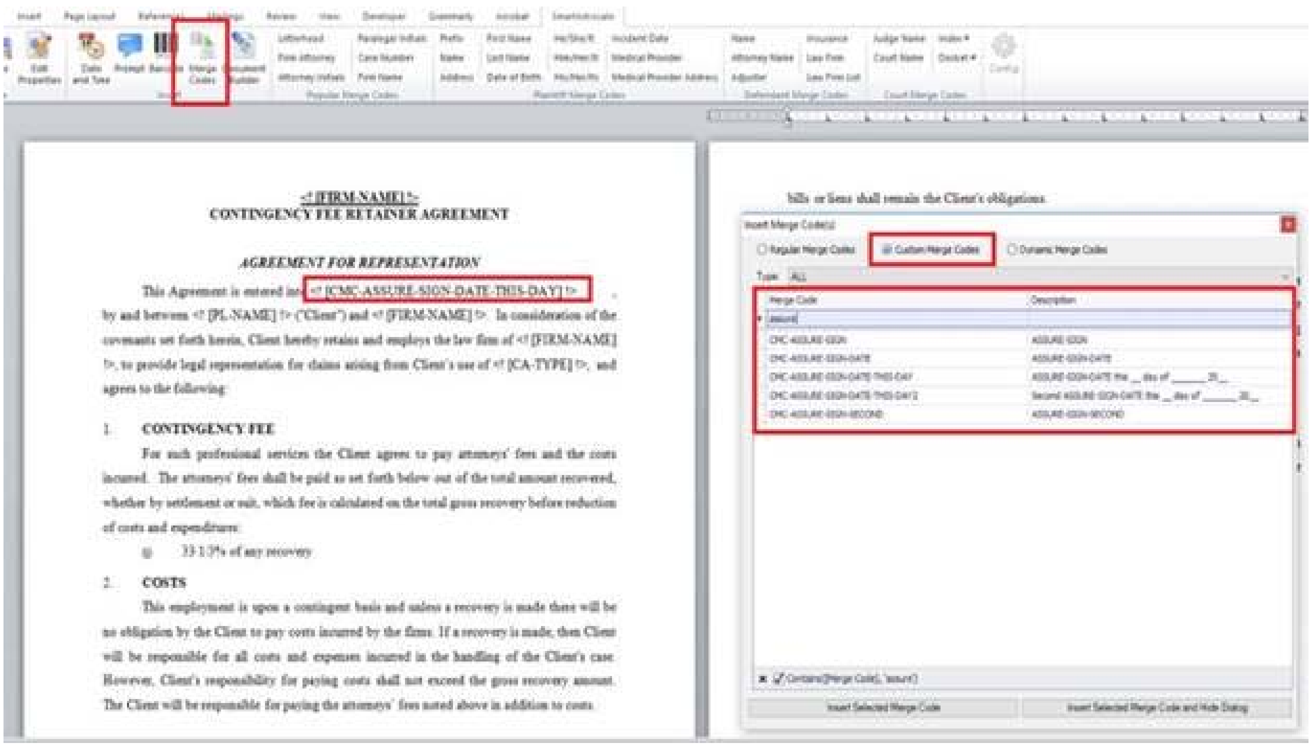
SmartAdvocate®
The Smarter Way To Manage Your Cases and Your Firm

27300 Riverview Center Boulevard, STE 103
Bonita Springs, FL 34134
ONLINE: www.smartadvocate.com
SALES: Call 1-877-Get-Smart (1-877-438-7627)
SUPPORT: Call 516-740-7777
Offices in New York and Florida

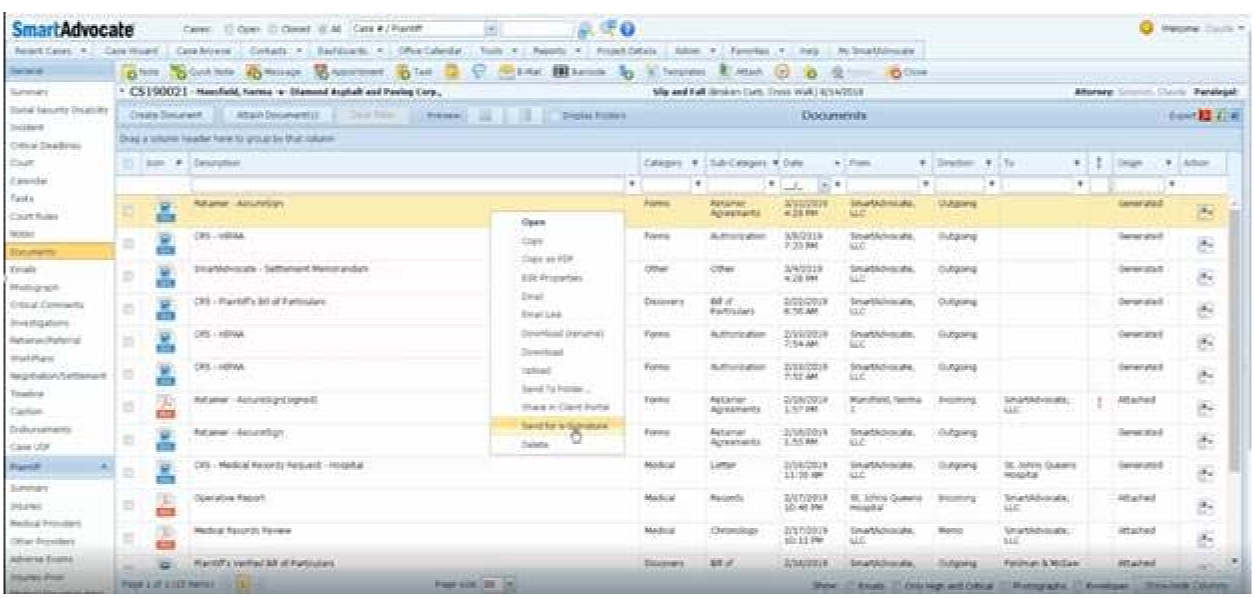
SMARTADVOCATE ASSURESIGN INTEGRATION INSTRUCTIONS

The SmartAdvocate AssureSign Integration and AssureSign account has been configured.

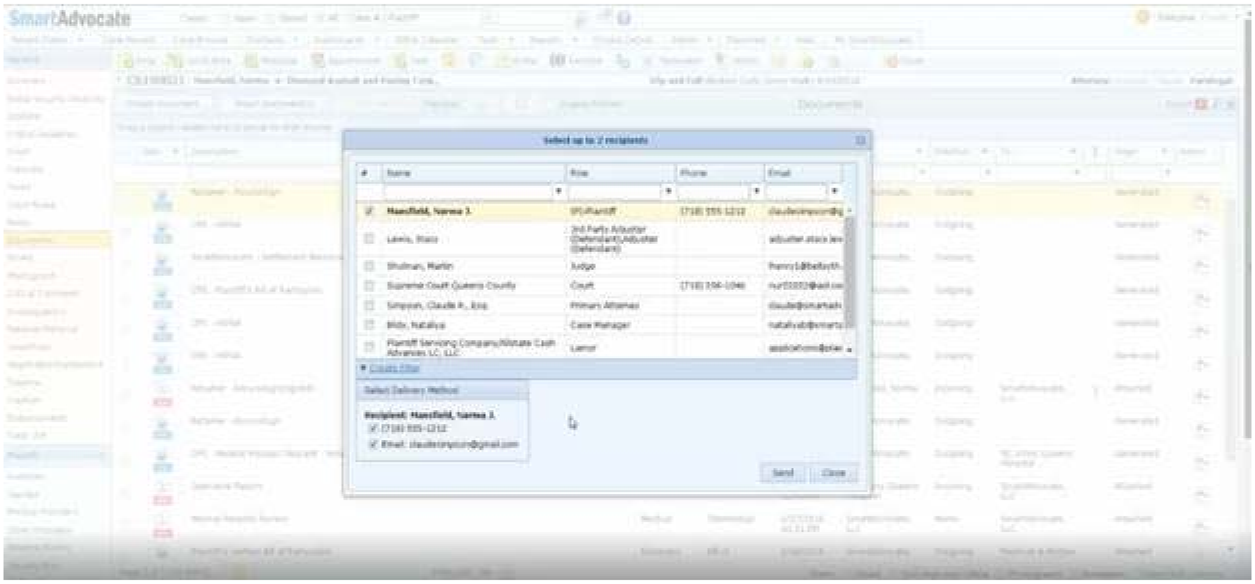
Please use the SmartAdvocate AssureSign custom merge codes within the SmartAdvocate Template editor as shown below:



After you generate your document, you can right click the document and select “Send for e-Signature”

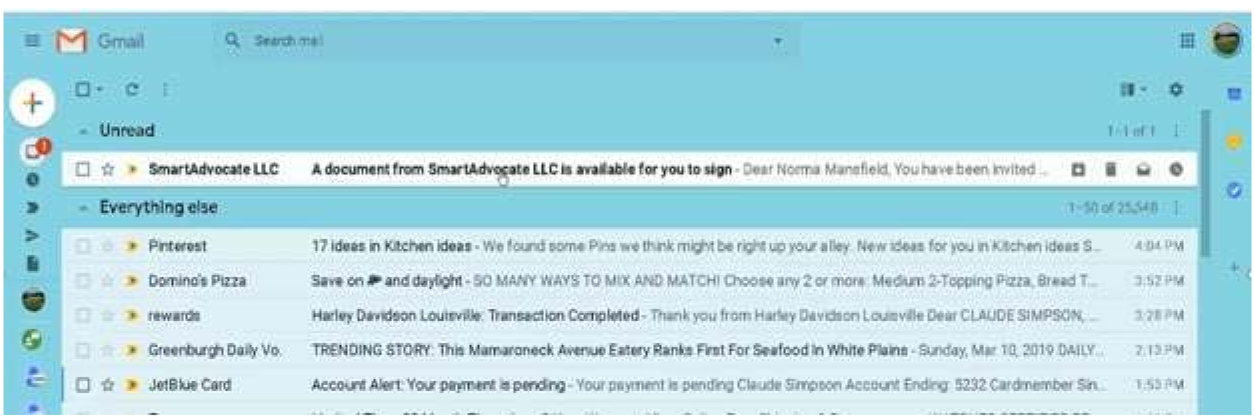


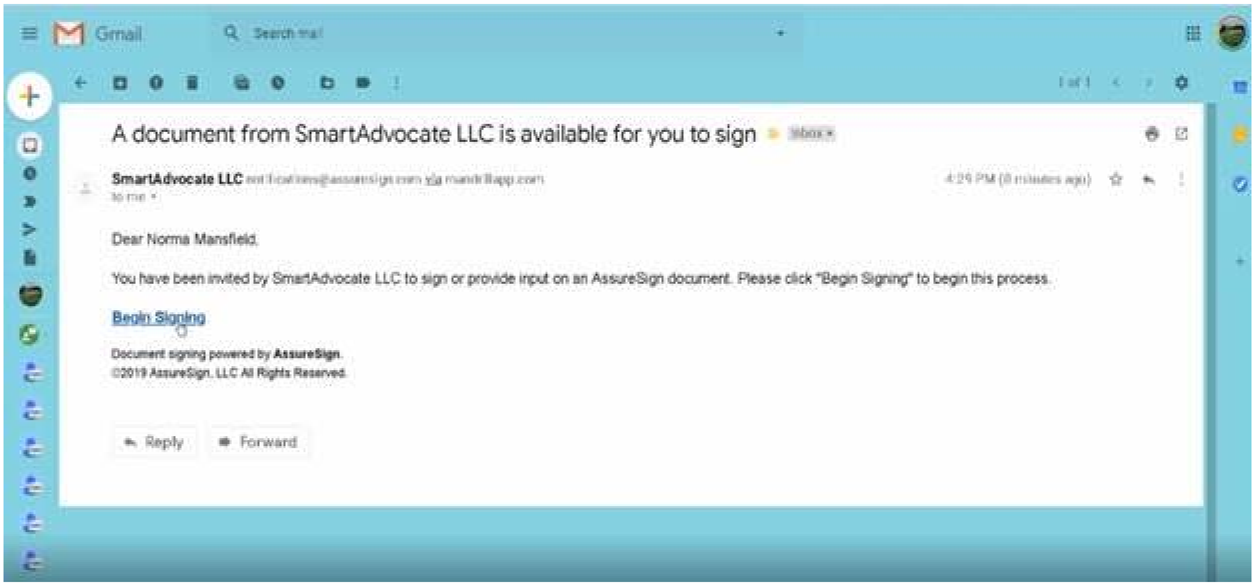
You are able to choose sending your document via text or email.



You will receive a notification via email that the document has been sent to your client.

Your client will receive either a text message or an email. Your client will open the email and click on Begin Signing.

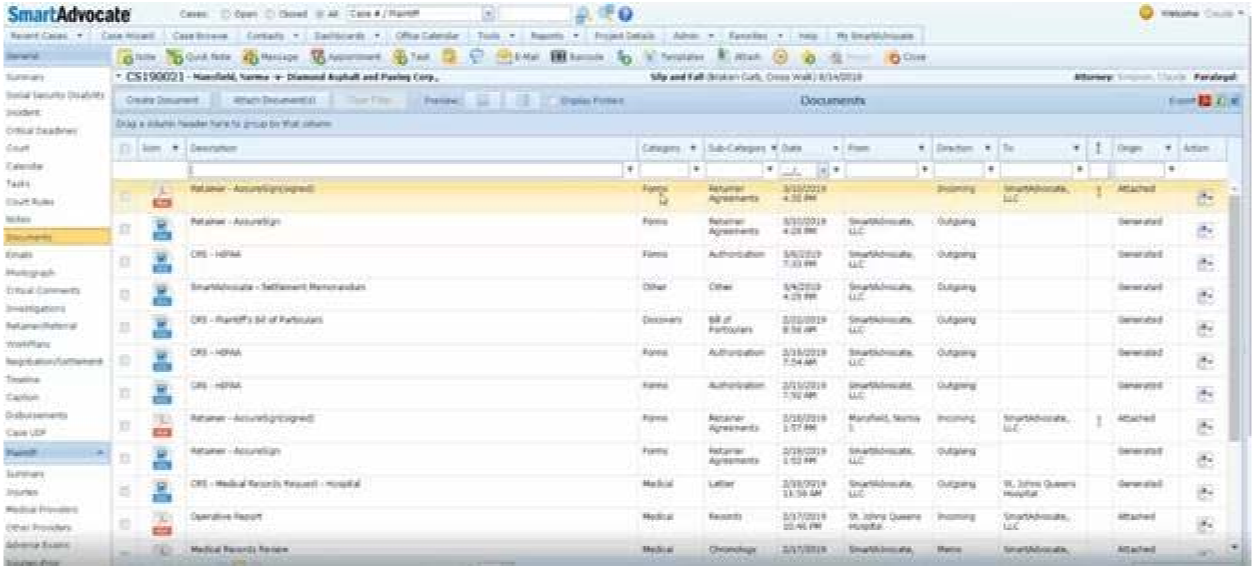




They will follow the 5 steps on AssureSign:

1. Once you receive our email via **ASSURESIGN**, please click the **BEGIN SIGNING** link in the e-mail that states "A document from Craig Swapp & Associates is available for you to sign.
2. This will open the **ASSURESIGN** program which will allow you to complete the document. On the welcome page, you will need to click on **CONTINUE**.
3. This will take you to the “Agree to Terms” page. Please check **I HAVE READ AND AGREE TO THE TERMS AND CONDITIONS** checkbox and click **START SIGNING**.
4. You can choose the signature format of either Typed with a keyboard or drawn with touch, mouse or stylus. Once you have completed your signature on this page click on **ADOPT SIGNATURE**. Click **APPLY SIGNATURE** to preview your signature on our documents. You can edit your signature if you wish.
5. Lastly, click **FINISH** button to complete your packet. You will have a chance to download the documents for your records.

Once your client has finished signing, your office will receive a notification email and your document will appear on the documents page as a PDF and the description will have (signed) added.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